

TASK STATEMENT OF WORK

1. Background

The Census Bureau is developing a census short form that includes space to provide data for six persons. This form will be used if Census 2000 is conducted using conventional techniques that do not include sampling. The development of this form has a high priority. Two different versions of the form, which contain the same content but different structures and folding patterns, have been drafted. These forms have not been subjected to any testing with respondents.

2. Statement of Work

The primary task is to conduct cognitive testing on two versions of the census short form. The forms have identical content, but different structures as follows:

Accordion fold: this form is printed as a 25 ½" by 11" sheet of paper that contains four folds. It is folded into five panels which open up like an accordion.

Bifold: this form is printed as a 25 ½" by 11" sheet of paper which contains two folds. When folded, it appears to the respondent as 9" by 11" pages.

The objectives of the cognitive interviews are to:

- 1) evaluate the navigational qualities of the respective forms and mailing packages, that is whether respondents can discern how to open and complete the forms, and do so accurately;
- 2) evaluate the motivational qualities of the respective forms, that is the extent to which each is evaluated positively or negatively, and which is preferred for use in Census 2000;
- 3) evaluate the respondent's understanding and reactions to the coverage questions and other information presented on the forms, which is subject to change for Census 2000;
- 4) assess the respondent's preference of two form colors—yellow and green.

Since, however, conducting cognitive testing of self-administered questionnaires is still an evolving science, a secondary task will be to evaluate the cognitive testing technique. The objective will be to determine if the motivational questions referred in 2) above exhibit question-order effects.

These interviews are **not** aimed at evaluating how people interpret and respond to race/ethnicity, age, or relationship questions that seem unlikely to change in any way as a result of these interviews. Rather the issue is how people handle the forms, whether they open them correctly, whether they are at all confused about what to do or how to respond, and other features of navigation. Do respondents open to the right page and go down the desired path? Do they re-

fold the questionnaire to go into the return envelope appropriately? Is one of the forms particularly attractive or repulsive? Does the size and shape of the mailing package and enclosed form seem to make a difference in how respondents perceive each form, whether they identify it as an official government census form, and how likely they are to report returning it in the mail?

The task is to conduct 32 interviews. One half will be done by the “think aloud” method, and the other half by the retrospective method. In the think aloud interviews, respondents will be asked to read and talk out loud as they complete the form. They will be probed about problems they encounter as they go through the form. In the retrospective interviews, respondents will be observed as they silently complete the form. The interviewer will observe what problems the respondent seems to encounter based on hesitations, facial expressions, erasures/cross-outs, and other indicators of confusion. After completing each form, respondents in both method types will be asked some motivational questions to determine their reactions and form preferences. At the end of the motivational questions, the respondent will be given the same questionnaire printed in a second color (green) and a color preference will be obtained. In the retrospective condition, the interviewer will probe respondents regarding problems the interviewers observed respondents having when filling out the forms earlier. It is anticipated that mixing methods in this manner will enhance the likelihood of identifying any problems with the two forms.

At least half of the interviews will consist of households that have a minimum of four members. In addition, an attempt will be made to conduct half the interviews with respondents who have a maximum education level of a high school diploma or some college courses. A third goal will be to include a significant proportion of minorities, including people who speak English as a second language. The interviews will be audiotaped and videotaped for review by the Census Bureau and possible subsequent coding and analysis.

Each respondent will be asked to complete both of the forms. Half will be asked to complete the accordion fold first, and the other half will be asked to complete the bi-fold first. Using two questionnaire orders, two cognitive interview methods, and two motivational question orders means that eight interview conditions will be used. In terms of the motivational questions, one half of the respondents will be asked their preference between the two forms before answering more specific questions about the forms and the other half will be asked to provide their preference after being asked a set of questions about each form.

The same set of procedures will be followed by Census Bureau staff in conducting an additional number of interviews. The Census Bureau will prepare a research protocol which will be followed both by the contractor and Census Bureau staff. The contractor will be briefed by Census Bureau staff to assure maximum similarity in the procedures used.

3. Deliverables

The contractor will provide the following deliverables:

1. Oral briefing on the findings of the research interviews
2. Videotapes of completed interviews (at the time of the oral briefing)
3. Final report (draft and final)

4. Schedule

The timing of this project is very tight.

Post-award meeting: April 28

Study plan: May 6

Complete cognitive interviews: May 29

Oral presentation to the Census Bureau: June 15

Formal written report: June 30

5. Staffing

The contractor is requested to provide the following staff:

project manager

recruiter

research interviewers/analysts

videocamera operator

6. Government Furnished Materials

The Census Bureau will:

1. Provide briefing with the contractor to explain the objectives of the research, finalize the research protocol, and coordinate research activities.
2. Provide printed copies of the mailing packages; that is, questionnaires, letters and envelopes, to be tested.
3. Provide the protocol to be used in conducting the interviews.
4. Provide technical staff to observe interviews being conducted.